

Fleet and Industrial Supply Center Jacksonville

Contracting Department

CUSTOMER GUIDE



“Delivering Combat Capability Through Logistics”

JANUARY 2002 EDITION

FISC Jacksonville Southeast Regional Partners





DEPARTMENT OF THE NAVY

FLEET AND INDUSTRIAL SUPPLY CENTER
JACKSONVILLE, FLORIDA 32212-0097

IN REPLY REFER TO:

January 2002

From: Director of Contracting
To: All Navy Customers

Subj: Contracting Department Customer Service Guide

Our purpose is to deliver combat capability through logistics by providing outstanding procurement support. We have aligned our Contracting Department to support the mission of providing Navy, Marine Corps, Joint and Allied Forces quality supplies and services on a timely basis. During the past few years our regional procurement oversight and authority has expanded, as a result, we have enclosed a culmination of what we think will be an invaluable tool for you when preparing your procurement documents and for a better understanding of the "One Touch Supply" vision.

This Contracting Customer Service Guide was designed for all of our customers and procurement specialists located in the United States Navy Southeast Region. Our customer base includes customers as far south as the Caribbean Islands, as far east as Florida, as far west as Texas and as far north as North Carolina. To support these areas, the Naval Supply System Command (NAVSUP), Fleet Industrial Supply Center Jacksonville (FISC JAX) has detachments located in Charleston, SC, Kings Bay, GA, Mayport, FL, Jacksonville, FL, Pascagoula, MS, Key West, FL, Corpus Christi, TX, Kingsville, TX, and Ingleside, TX.

As you will note when reading through the guide, there are sections that may or may not pertain to your organization. We recognized this, but because it was developed for all customers we are encouraging you to tab any and all sections that are peculiar to your particular procurement. It is our hopes that this guide will become a working part of your procurement tool kit.

I am confident that this guide coupled with training from the FISC JAX Contracting Department will satisfy your procurement needs and ultimately lead to improved fleet support and a better understanding of "One Touch Supply"...it is our vision of the future.


Daniel P. Seep
Lieutenant Commander, SC, USN

**FLEET AND INDUSTRIAL SUPPLY CENTER JACKSONVILLE
CONTRACTING DEPARTMENT
CUSTOMER GUIDE**

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INTRODUCTION

The Fleet and Industrial Supply Center (FISC) Jacksonville main site is located at Building 110, 3rd Floor, 110 Yorktown Ave., Naval Air Station, Jacksonville, Florida. FISC Jacksonville maintains contracting sites and detachments in various locations throughout the Southeast Region for simplified acquisition procedures (SAP) (less than \$100,000). All large purchase (LP) contracts (greater than \$100,000) are processed at the FISC Jacksonville main site.

PURPOSE

This guide provides Fleet and Industrial Supply Center (FISC) Jacksonville customers with information to assist in the preparation and submission of a comprehensive and workable procurement package. It is intended for use as a handy reference for the preparation of requests for contractual procurement. When properly used, it will save both technical and contracting offices considerable time and administrative expense.

POINTS OF CONTACT

CDO, For emergency after hours requests	1 800 962-3494
Director of Contracting	DSN: 942 (904) 542-1000 X173
Deputy Director of Contracting	DSN: 942 (904) 542-1000 X174
Director of Special Projects/NMCI	DSN: 942 (904) 542-1000 X175
Director of Large Contracts	DSN: 942 (904) 542-1062
Director of Policy and Analysis	DSN: 942 (904) 542-1251
Director of SAP and Operations	DSN: 942 (904) 542-1250
Mainsite/NADEP Supervisor	DSN: 942 (904) 542-1250
Kings Bay Supervisor of Purchasing	DSN: 573 (912) 673-2124
Mayport Supervisor of Purchasing	DSN: 960 (904) 270 5699 X150
Pacagoula Supervisor of Purchasing	DSN: 358 (228) 761-2120
Charleston Supervisor of Purchasing	DSN: 794 (843) 764-7292
Corpus Christi/Ingleside/Kingsville Supervisor of Purchasing	DSN: 861 (361) 961-3662
Voucher Payment Supervisor	DSN: 942 (904) 542-1048
Key West Supervisor of Purchasing	DSN: 483 (305) 293-2212
Meridian Supervisor of Purchasing	DSN: 637 (601) 679-2163

- Encl: (1) Items Requiring Special Attention
(2) Lease-Purchase Justification
(3) Contract Support Service (CSS) Certification
(4) Sole Source/Urgency Justification Forms, J&A Format
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(6) Documentation Form for Contract Administration Plan
(7) COR/Surveillance Officer Nomination Letter
(8) Sample of SAP Acceptance Memo and Procurement Plan
(9) Sample of L/P Acceptance Memo and Procurement Plan
(10) FY Requisition Submission Deadlines Notice

CUSTOMER SERVICE STANDARDS

To ensure that your expectations are met, it is very important that you include us in the beginning of the conceptual/action planning process, regardless of the dollar value of your requirement. Our goal is to be a business partner with you throughout the procurement process from the inception of your request until the contract is completed. We call this cradle to grave. You do not need to wait until you receive a hard copy of the funding before we start talking. Just give us a call and within 3 working days you will be contacted by one of our contracting support representatives. They will work closely with you to ensure we satisfy your requirements and meet the applicable Procurement Administrative Lead Time (PALT) set forth below:

REQUIREMENTS <\$25K: Our average PALT for these requisitions, including those associated with GSA and UNICOR buys, will be Pierside 10 working days and Non-Pierside 20 working days after acceptance of your complete purchase request by our office. Our goal is to ensure none exceed 25 days.

REQUIREMENTS \$25-\$100K: Our average PALT for these requisitions, including those associated with GSA or UNICOR buy, will be within 45 working days after acceptance of your complete purchase request by our office. Our goal is to ensure none exceed 60 days. **NOTE:** You should receive an email acceptance memo with a procurement plan within five working days after acceptance of your requisition in the Contracting Department for all competitive procurements over \$25,000.

COMMERCIAL ITEMS \$100K-\$5M: Our average PALT for these requisitions, including those associated with GSA schedules, will be within 75 working days after acceptance of a complete purchase request by our office. Our goal is to ensure that none exceed 120 days. **NOTE:** You should receive an email acceptance memo with a procurement plan within five working days after acceptance of your requisition in the Contracting Department for all competitive procurements over \$25,000.

ALL OTHER PREAWARD REQUIREMENTS: For all other contract requirements, such as base operating support services, mess attendant services, OMB A-76 Circular studies, complex supply buys, analyst support services, etc., which are greater than \$100K, **it is critical** that you involve us in the conceptual/early planning stages. We can then provide recommendations/guidance on what might be the best approach, e.g.: best value, oral presentations, source selection plan development, incentives, oversight, milestones, etc. Our goal is to complete 95% of these more complex and high visibility requirements within the jointly developed timeframes set forth in the final procurement milestone plan.

MODIFICATIONS: Our average PALT for administrative modifications not requiring the contractor's signature (bilateral), will be within 5 working days after acceptance of your complete package by our office.

PAPERLESS DISTRIBUTION OF PURCHASE ORDERS, CONTRACTS AND MODIFICATIONS: Our goal is to pursue a paperless environment and electronically distribute all contracts and modifications awarded on the DOD Standard Procurement System to the e-mail address(s) of your choice within 1 working day after the document has been released by the contracting officer. To accomplish this goal, we require those e-mail addresses to be provided with your requisition.

STANDARD E-MAIL DISTRIBUTION LIST FOR ALL CONTRACTS AND MODIFICATION DOCUMENTS. Identify and provide the e-mail addresses of all those people within your command who must receive a copy of **every** purchase order, contract, or modification issued by our office. All commands should submit this list to Janell_G_Palmer@jax.fisc.navy.mil. (Note: contractors will also receive contract award documents via e-mail.)

ADDITIONAL E-MAIL DISTRIBUTION UNIQUE TO EACH CONTRACT ACTION. On every purchase request for a modification, provide any additional e-mail addresses for distribution of the resulting contracting document. In addition, e-mail Addresses for technical points of contact must be identified on **ALL** purchase requests. Our buyers will use e-mail to contact your technical POC if there are any questions.

CUSTOMER FEEDBACK: Following the completion of our contracting support, please go to the NAVSUP web site at <http://www.ec.navsup.navy.mil/contracting> and complete the customer satisfaction survey so we can get immediate feedback from you regarding the quality of services you received. If you do not have access to the Internet, let your contracting representative know and they will get the survey to you either via e-mail or fax.

AFTER-THE-FACT-PURCHASES - UNAUTHORIZED COMMITMENTS. NAVSUPINST 4200.85C, Chapter 1 requires that a requisition be prepared and approved before the Contracting Officer initiates purchase action. The award date of the order cannot be after the performance period specified. FISCJAX Contracting Officers are not authorized, under any circumstances, to issue purchase actions after the fact. Requisitions received after performance has already commenced should be referred to the Director of Policy and Analysis for proper processing of the unauthorized commitment. **Your Commanding Officer will be notified of every unauthorized commitment.**

FISCAL YEAR REQUISITION SUBMISSION DEADLINES

FISC Jacksonville Notice 4235 is issued each year to improve the procurement planning process and to ensure the timely obligation of customer annual funds. This notice is applicable to all activities that submit purchase requests to the FISC Jacksonville Contracting Department and all detachments and sites for action. It discusses Procurement Administrative Lead Time (PALT) forecasts and the required deadline dates for submission of purchase requests. The calendar dates change but the time frames remain the same. See enclosure (10) for sample notice.

Note: Every effort will be made to process all requirements, time permitting. Requisitions submitted after normal cut-off dates will be processed based upon priority and end of Fiscal Year time constraints. Every effort should be made to submit requirements within the established cut-off dates in order to ensure timely processing of requirements and obligation of funding.

PURCHASE REQUEST DESCRIPTION, EXAMPLES & SCREENING REQUIREMENTS

PROCUREMENT PACKAGE: Ensure that procurement packages are complete and that your requirements are clearly defined. A complete/workable purchase request allows us to provide immediate service to our customer and saves you from expending time and resources on costly rework and re-submissions. A purchase request (PR), sometimes called a requisition, shall be prepared and approved before the contracting officer initiates a purchase action. Incomplete PRs will be returned to the initiator (customer) for correction.

ADEQUATE DESCRIPTION OF THE REQUIREMENT: The supplies/services must be described in a manner which will encourage maximum competition (this includes rental and maintenance of IT equipment) and eliminate any restrictive features which limit acceptable quotes to one contractor's product. Methods of describing requirements include:

- a. **Purchase Description.** A purchase description is the most common and preferred method of describing simplified acquisition requirements. An adequate purchase description should set forth the essential physical and functional characteristics of the supplies/services required. It should not be unduly restrictive and shall not specify a product peculiar to one manufacturer (e.g., by manufacturer, brand name and part number (P/N) only) unless it is essential to the Government's requirement; and other similar products lack the particular feature necessary to meet the Government's minimum requirements. A purchase description should include the following characteristics, as necessary, to describe the Government's minimum requirement:
 1. Common nomenclature;
 2. Kind of material (i.e., type, grade, alternatives, etc.);
 3. Electrical data, if any;
 4. Dimensions, size, or capacity , (minimums and maximums);
 5. Principles of operation;
 6. Restrictive environmental conditions;
 7. Intended use, including location within an assembly and essential operating conditions;
 8. Equipment with which the item is to be used;
 9. End item application;
 10. Original Equipment Manufacturer's Part Number, if applicable; and
 11. Other pertinent information that further describes the item, material, or service required.
- b. **Military/Federal Specifications.** When simplified acquisition procedures are used, commercially available items are preferred. **Military/Federal (MIL/FED)**

Specifications are discouraged and should only be used as a last resort. However, if the customer describes the item by a MIL/FED Specification, the ordering data contained in paragraph 6.2 of each specification must be included. When a MIL/FED specification is used, the buyer must check to see if a Qualified Products List (QPL) applies. If a QPL does apply, award can only be made to a contractor whose product is listed on the QPL.

- c. **Brand name or equal.** Generally, the **least preferred** and minimum acceptable competitive purchase description of a requirement is the identification of a requirement by use of a brand name followed by the words “or equal”. (Brand name or equal cannot be used for requirements greater than \$100,000.) **This technique should only be used when a more detailed description cannot feasibly be made.** All known brand name items meeting the requirement should be included. Brand name or equal descriptions must also set forth those salient physical, functional, or other characteristics of the brand name product which are essential to the Government’s needs. These characteristics must be provided by the customer in the PR. If such information is not included, the PR must be returned to the customer for more information/cancellation. Any contractor who submits a quotation on an “equal product” is required to clearly identify the item by brand name (e.g., catalog, description, etc.) which shows that the offered product meets the salient physical, functional, and essential characteristics required. This data is then furnished to the customer who must determine if the offered product is in fact equal to the brand name specified. If the product is not equal the customer shall submit a written determination explaining why the “or equal” product is not acceptable.

d. **Statements of Work.**

- (1) If the requested requirement is a service, the PR should include a **detailed** statement of work (SOW), which should include a **description** of the work to be done, **where and when** it is to be done, and **what end result** is expected. The procurement package should include a detailed evaluation plan describing specifically how offers will be evaluated. The SOW shall specifically and completely describe the work the contractor must perform. Describe the desired outcome and results of the service. The contractor will perform only the work described in the SOW. If service is for repair of equipment, provide the make, model, serial number, and acquisition cost of the equipment being repaired. The specifications must state the Government’s minimum requirements. The Government’s specifications should be independently developed, however, you may use technical information gathered during market research. **Do not furnish a vendor’s quote as Government specifications.** Except in extraordinary circumstances, the cost of the repair should not exceed 50% of the acquisition cost. Equipment repair or installation service requests must include the present or proposed location of the equipment and a customer point of contact.

- (2) Examples of a Statement of Work:

a. Incorrect

Bench Test and Calibrate SSTG Woodward Governor

b. Correct

Labor and material to overhaul, bench test, and calibrate one SSTG Woodward Governor P/N 8240-203 (Woodward), Model EGB10C, S/N SSTG. Contractor to provide Technical Representative services for shipboard Governor operation and testing with time being limited to (8) eight hours at regular time rate. Repairs to include disassembly, cleaning, inspection, repair, and reassembly. Notification of readiness for bench test observance by ships forces point of contact. Bench test in observers' presence and set linkage to proper ratio as per factory specifications. New parts shall be installed. Use of reconditioned or used parts is unauthorized.

QUANTITY and UNIT of ISSUE. The contracting officer shall normally purchase the exact quantity stipulated on the PR; however, when an upward adjustment in quantity is desirable in order to obtain the most economical buy, or where it is otherwise advantageous, the purchasing activity may make such adjustment provided the adjustment does not exceed funding restrictions annotated on the face of the requisition or:

- a. On a case-by-case basis the PR originator is contacted for authority to adjust the requested quantity; or
- b. The originator has a pre-established written agreement with the contracting officer which automatically allows the contracting officer to effect changes to the PR quantity.

In all cases where the originator authorizes the purchasing activity to effect automatic adjustments in quantity to obtain the most economical buy, a restrictive statement to prevent over expenditures shall be annotated on the face of the requisition. This statement shall read: "This requisition subject to fund limitation. Do not initiate supply action which will result in charges in excess of \$_____."

DELIVERY INFORMATION. Required delivery information would include information such as required delivery date or period of performance, place of delivery, if partials will be accepted, and priority designator, if appropriate. The required delivery date (RDD) must be stated as a specific calendar date (Julian dates are acceptable).

UNIQUE REQUIREMENTS. Any other unique requirements such as marking, packing, or a Transportation Accounting Code (TAC) shall be included as necessary.

PRICE ESTIMATE. A price estimate and the basis upon which the estimate was developed; (i.e. previous buys and prices paid for same or similar item, catalog prices, newspaper advertisements, etc).

FUNDING.

a. Each purchase request shall contain adequate funding to support the requirement. This is usually shown by approved accounting and appropriation data and an estimated dollar amount. This requirement is necessary unless the requirement is backed by a bulk-funding document. The estimated cost shown on the PR is the amount that has been committed by the requiring activity to cover the purchase of the requested supplies or services. Responsibility for controlling the obligations of funds and the limitation of such funds is vested exclusively in the allotment holder or his designated representative. Consequently, NAVCOMPT Form 2276 contains a certification by the approving signature block stating, "I certify that the funds cited are properly chargeable for the items requested." For any other PR/requisition form the person signing/approving the document is also making the certification even though it may not be preprinted on the PR form itself.

b. Purchase Requests (PRs) Containing Restrictions as to Availability of Cited Funds. If the PR contains a cut off date for obligation of the cited funds, every effort shall be made to schedule procurement actions to meet the established deadline. However, meeting the established deadline does not relieve the contracting office of compliance with established procurement policies including adequate competition and fair and reasonable pricing. Any known or anticipated delays which may prevent the obligation of funds by the deadline date shall be timely reported to the requisitioner. When the purchase price will exceed the monetary ceiling amount of the PR, no obligation action shall occur unless additional funds are authorized and obtained. These funds may be authorized and obtained by any of the following methods:

1. When a NAVCOMPT Form 2276 is used, an increase or a de-obligation of unused funds must be via an amended NAVCOMPT Form 2276. An increase may be requested and authorized by message when time does not permit a written requisition amendment.
2. Authorization may be obtained by telephone, but **must** be confirmed in writing.
3. Customer activities which place a high volume of purchase actions with their respective contracting office may establish written agreements to permit the contracting office to exceed the amount committed on an individual purchase request within specific amounts or limitations.

c. **Purchase Card as Method of Payment.** When the purchase card will be used as the method of payment the Cardholder's name and telephone number shall be listed on the requisition.

APPROVALS and/or SIGNATURES. Purchase requests should include all necessary justifications and signatures approving the requirement. Other approvals that might be

documented include items such as sole source justifications, IT approvals, HAZMAT certifications, etc. Examples of some requirements that generally require special approval can be found in Enclosure (1).

INSPECTION and ACCEPTANCE. Supplies obtained using simplified acquisition procedures are normally inspected and accepted at destination. Any special inspection and acceptance procedures deemed necessary by the requiring activity shall be noted on the purchase request.

POINT of CONTACT. POC name, telephone number and email address **must** be listed on the requisition in case additional information is required.

OPTIONS. The requiring activity should identify on the purchase request any known requirement that may be suitable for award as a basic contract with subsequent year's options. This allows the contracting officer to include options in purchase orders or contracts when it is in the Government's best interest.

ITEMS REQUIRING SPECIAL ATTENTION. A list of requirements that generally require special approvals can be found in Enclosure (1). This enclosure provides a ready reference for requisitioners, technical and contracting personnel when preparing and processing purchase requests. The guide is not intended to be all-inclusive nor is it intended to supplant the most recent regulations and directives applicable to the items/services listed. If your requirement is listed refer to NAVSUPINST 4200.85C, Enclosure (2) for specific instructions.

UNICOR ITEMS. UNICOR (Federal Prison Industries) sells furniture, work clothing, eyeglasses, signs, forms, and other items to Federal agencies. Their catalog is available online at <http://www.unicor.gov>. UNICOR is a mandatory source for these items. **In order to procure your items from a commercial source, you must provide a UNICOR Waiver with your purchase request.** Call UNICOR Customer Service at (800) 827-3168 or obtain waiver information at <http://www.unicor.gov/customer/waiverform.htm>.

RENEWAL OF RENTAL/LEASE/MAINTENANCE AGREEMENTS

At the end of each fiscal year, **numerous** agreements expire and require renewal on 01 October. In addition, many new requests are submitted. To ensure placement of purchase/delivery orders or a contract in a timely manner, activities are urged to submit their purchase requests by the date established by FISC Jacksonville Contracting Department. All requirements submitted after that date risk untimely processing. These documents should cite next fiscal year funds with the statement "Subject to Availability of Funds".

Activities should ensure all procurement packages for renewal and new rental/lease/maintenance agreements contain adequate information. Provided below is a checklist of required documentation:

- a. Point of contact information - name, code, telephone number and e-mail address.
- b. Purchase/delivery order number for services during last fiscal year.

- c. Physical location of equipment (building number, street address, room number, name of activity, etc.).
- d. Period of performance
- e. Place of performance of maintenance or service (building number, street address, room number, name of activity, etc.).
- f. Model number(s), serial number(s), manufacturer's name and if government-owned equipment the acquisition cost of each piece.
- g. Complete statement of work describing maintenance and/or rental services required.
- h. Complete line of accounting for next fiscal year, including cost code and fund code.
- i. If the acquisition cost of Government-owned equipment exceeds \$25,000 provide the name and telephone number of property administrator.
- j. If sole sourced, fully justify sole source documentation if the services can only be performed by one company (in accordance with FISCJAX sole source and urgency form).
- k. If the services are for lease of equipment, a lease versus purchase analysis is required.
- l. If the services involves Information Technology (IT) equipment (formerly FIP/ADPE), cellular telephones, facsimile machines, beeper/pagers, or long distance service, etc., the requirement must be certified in accordance with activity approved annual Information Technology Infrastructure Abbreviated Acquisition Program (ITIAAP) Plan (See SECNAVINST 5000.2 series).
- m. If the service involves beepers or cellular phones, provide beeper and/or cellular telephone number, model number, serial number, activity location and name of the Government employee utilizing the equipment.

Note: Government personnel that are not authorized to commit funds on behalf of the Government should be cautious to not create an "unauthorized commitment". Only warranted Contracting Officers can commit the Government. Purchase requests sent to FISC contracting activities should be followed-up by the customer to ensure a purchase/delivery order or contract has been awarded. Customers should not automatically assume a contract award or an order was made if they have not received a cancellation or rejection status from FISC.

Customers should remember to use their Purchase Cards for any purchase under the \$2,500.00 threshold. Purchase cards should be used for general annual services and maintenance such as delivery of bottled water, beepers/pagers, cellular phone service, etc. Remember, if you are procuring bottled water you must have a letter on file stating that the water is unfit for human consumption.

RENT/LEASE NOT JUSTIFIED. If you are requesting rent/lease of an item that can be purchased, you must show the calculations justifying your decision. Show the calculations for the rent/lease option and then show the total ownership cost of buying the items. Include the maintenance and other ownership costs in the "purchase scenario" for the entire useful life of the item. Note that there could be a salvage value to the Government even after the end of the item's useful life. Based on the calculations, justify your decision to rent/lease rather than purchase. See Enclosure (2).

MARKET RESEARCH INDICATED BUT NOT ATTACHED. Provide all the information collected by your activity in your market research into suggested sources. A market survey is simply finding out which companies can provide what you're looking for. Market research can be accomplished by searching for sources over the Internet, reviewing product literature, reading technical journals, or contacting sources over the phone. Describe and document any market survey conducted. Market research **should not include** a request for pricing information unless it is readily available to the public, such as a published price list or catalog. Include companies contacted and the information they provided, especially if it concerns a sole source requirement. **Do not furnish a vendor's quote as the Government specifications.** If your requisitions must be forwarded for approval, ensure that any attached documents are not removed during the approval process. FISC needs all relevant background information along with your funding document to ensure we procure items meeting your requirements.

SERVICES FOR ADVICE OR ASSISTANCE require higher level approval on your purchase request and require a statement as to Defense Technical Information Center screening. See SECNAVINST 4200.31C (<http://neds.nebt.daps.mil/Directives/4200c31.pdf>) when requesting contractor services for contractor advice and assistance to improve organization policy development, decision-making, management processes or procedures, and administration. See Enclosure (3) for sample Contract Support Service (CSS) Certification.

URGENT PURCHASE REQUESTS. Urgent requests are for supplies or services that will result in work stoppage are mission essential and normal processing time would result in injury to the government. Urgent requirements that are identified by the customer and documented with a valid urgency impact statement will be worked by FISC immediately upon receipt. Describe the compelling nature of the urgency, how the Government will be seriously injured and what the financial implications might be. Examples: Supplies or services needed at once because of fire, flood, hurricane or other disaster. Supplies or services required at once for repairing roofs or windows to prevent water damage or destruction of computers, office areas, personnel records, etc. Essential equipment or repair needed at once to comply with orders for a ship to deploy or for an aircraft which is grounded and as a result the Navy cannot perform its mission. Essential equipment or repair needed at once to: (a) prevent work stoppage of ___employees at an average hourly rate of \$____; or (b) repair the AN/AIR-67 Electronic Counter Measuring System. Failure to repair would result in replacement of the system an estimated cost of \$____. Urgent requirements can be hand carried, submitted electronically, faxed or e-mailed. Commands that fax or e-mail requirements should call the purchasing office to confirm receipt. Once the fax is received, immediate processing will begin. Good two-way communication is key to a successful transaction. See enclosure (4) for urgency justification form and J&A format.

MISSING OR INADEQUATE URGENCY JUSTIFICATION. All requirements estimated at over \$10,000 are required to be publicly posted for 10 days and if over \$25,000, to be published in the FEDBIZOPPS for at least 15 calendar days prior to the issuance of a solicitation unless an exception at FAR 5.202 applies to the proposed purchase, except that for commercial items, the contracting officer may –

- (1) establish a shorter period for issuance of the solicitation; or
- (2) use the combined synopsis and solicitation procedure prescribed in FAR 12.603.

The contracting officer need not submit the notice required by 5.201 when the contracting officer determines that the proposed contract action is made under the conditions described in 6.302-2 (or, for purchases conducted using simplified acquisition procedures (SAP), if unusual and compelling urgency precludes competition to the maximum extent practical) and the Government would be seriously injured if the agency complies with the time periods specified in FAR 5.203. Such determination requires a statement of urgency (SAP) or a formal Justification and Approvals (J&A) if over \$100,000. See enclosure (4) for form and J&A format.

SOLE SOURCE REQUIREMENTS. If the purchase description you provide limits the availability of the item or service to one source (sole source), the requisition must be accompanied by a full justification explaining why the item is the only one that will meet the Government's needs. This sole source statement must be attached to the requisition. Requirements over \$100,000 require a formal Justification and Approval (J&A) in the format specified in Federal Acquisition Regulation (FAR) Part 6.303-2 (can be found at the following web sites: <http://farsite.hill.af.mil/farsite.html>), (<http://www.arnet.gov/far>), or by contacting a FISC contract specialist). Sole source requirements over \$50 million must have the approval of the Commander, Naval Supply Systems Command, Mechanicsburg, PA. See enclosure. (4) for sole source justification form and J&A format.

- a. The justification must demonstrate that only one source and no other type of supplies/services will satisfy the minimum needs of the Government. Some reasons could be (1) Specifications/drawings (attached) contain **proprietary** or **restricted** use legends; (2) This is an aircraft/ship repair part/service that is **available only from** the original equipment manufacturer. Award to any other source would pose safety of flight issues/shipboard habitability and/or would result in unacceptable delays in fulfilling the requirement; (3) It is necessary that the item/part be acquired from the one source that is compatible and interchangeable with existing equipment.
- b. If the contractor has a unique capability, whether it is an item or service, it is insufficient to simply state that the contractor is unique. The unique characteristics must be set forth, the unique expertise must be described, or the unique equipment or facilities or proprietary data be explained.
- c. Statements that a contractor has the best capability or offers the lowest price or is the only qualified source is not justification for sole source. A strong presentation that merely establishes that the recommended source is most highly qualified to perform but does not establish why other sources cannot perform is unacceptable.
- d. Incumbency does not justify sole source.

- e. Administrative delay, lack of adequate advance planning or lack of an approved funding document does not create an urgency that justifies sole source.
- f. Timeframe does not justify a sole source. If time is a factor the following data must be explained: (1) Provide the date by which the supplies/services must be delivered; (2) Indicate how that date was determined and its significance; and (3) Indicate the impact of delay beyond that date in terms of program schedules, milestones, etc. Again uniqueness and timeframe must not be confused and inappropriately interchanged.

SOLE-SOURCE JUSTIFICATION MISSING OR INADEQUATE. We will compete all requirements (and you must provide specification permitting all capable offerors to quote) unless you can justify why only **ONE SPECIFIC MANUFACTURER/SERVICE PROVIDER** can fulfill the Government's minimum requirements. See Enclosure (4) for sole source justification form and J&A format.

CITED MILSPECS/FEDSPECS ARE CANCELLED OR SUPERCEDED. Your purchase request cites MILSPEC/FEDSPEC _____ which has been cancelled or has been revised. Please rewrite our specifications to include, where justified (see below), only current and effective MILSPECS. See the website <http://astimage.daps.dla.mil/online> for current and effective DoD specifications and standards. **NOTE:** It is now standard Government practice to use commercial standards as a basis of specification. MILSPECS should be used only when commercial specifications are not sufficient to insure adequate quality or safety standard.

CITED GOVERNMENT-UNIQUE SPECIFICATION NOT ON THE WAIVER LISTS. Your purchase request cites specification _____ which is: (1) not a performance specification (identified by the "MIL-PRF-" designation, (2) not a guide specification as described in DoD 4120.3-M, Appendix H, (3) is not a commercial item description (CDI), (4) is not an interface standard, (5) is not a commercial standard practice, (6) is not a military handbook, (7) is not a non-Governmental (commercial) standard, (8) is not shown on the list (<http://www.dsp.dla.mil/reform/exempt.html>) of DoD standards which we may use without a waiver, and (9) is not shown on the list (<http://www.acq-ref.navy.mil/waiv.html>) of specs which may be cited in Navy acquisitions without a waiver. Please rewrite your specification/statement of work without reference to this specification. If you believe the use of this specification or standard is justified, you must obtain a waiver in order to cite it.

PURCHASE REQUEST INCOMPLETE (OTHER ITEMS). NAVSUP PUB P547, available at <http://www.nll.navy.mil/nll/filedetail.cfm?id=13>, is the "Contract Request Preparation Guide". Part 2 of that publication, beginning with page 21, is an important reference for determining the completeness of any purchase request. In addition, please provide the e-mail address of the technical point of contact, the e-mail addresses of all those who should receive the resulting order/contract, the mailing address where the contractor should send invoices, and the payment office.

DESCRIPTION OF FORMS.

A variety of forms may be utilized as purchase requests, including:

- a. Request for Contractual Procurement (NAVCOMPT Form 2276) (RCP).
- b. Order for Work and Services/Direct Citation (NAVCOMPT Form 2276a).
- c. DoD Single Line Item Requisition System Document (manual) (DD Form 1348, DoD Single Line Item Requisition System Document (manual – long form) (DD Form 1348-6) or (DD Form 1348-6) or DoD Single line Item Requisition Document (mechanical) (DD Form 1348m); and for afloat units, Non-NSN Requisition (NAVSUP Form 1250-2).
- d. DD Form 1149, Requisition and Invoice/Shipping Document
- e. Locally approved intra-activity requisition forms may be used provided they: (1) are approved by competent authority (e.g., the activity comptroller, parent command, type commander); and (2) contain all the required information cited in the forms discussed in subparagraphs (a) through (c) above.
- f. Military interdepartmental Purchase Requests (MIPR) (DD For 448). (MIPRs may be forwarded by the originating military department to another military department or government agency for purchase action.) Field contracting activities responsible for single department procurement may receive requests for purchase action on a MIPR or, from Navy activities, on a Request for Contractual Procurement (NAVCOMPT Form 2276).

Receipt of any other form is unacceptable and may delay your procurement. For a single requirement consisting of multiple line items, a list of the various line items or part numbers can be attached to the NAVCOMPT 2276 or the DD 1149.

Note: The preferred method of submitting requirements to FISC Jacksonville is via electronic means. FISC JAX customers may utilize PRWeb/Acquiline to input requirements directly into the Standard Procurement System (SPS) used by our contracting personnel. By inputting your requirement directly into SPS, customers avoid delays associated with paper processing. Email requisition documents are also available at www.jax.fisc.navy.mil/Services/Contracting/default.htm. These documents may be downloaded, completed, and submitted to us as an email attachment to: fiscjax_rqnin@jax.fisc.navy.mil.

PAPERLESS PURCHASE REQUESTS: Commands not using Acquiline/PRWeb are requested to e-mail their NAVCOMPT 2276, DD1149 and equivalent requests for contractual procurement to fiscjax_rqnin@fisc.jax.navy.mil. PR's may be e-mailed, or the preferred method, direct input into the Acquiline (PRWEB) system. If over \$100,000 we will require a signature document. You may submit a scanned copy of your signed PR as an attachment to e-mail. All blocks on the PR form, i.e., FSC, Project code, COG, etc., must be completed. All PRs shall list point of contact (POC) information to include name, telephone number and e-mail address. We will be making electronic copies of NAVSUPCOMP 2276 and other useful forms available on the contracting department website.

DOCUMENTATION REQUIRED FOR MICROPURCHASES (<\$2500)

Purchases less than \$2500 (Micro Purchase) must be made by the customer using customer Government-wide Commercial Purchase Card (GCPC) or Accommodation Checks.

Requirements less than \$2500 will only be accepted to be purchased by FISC with appropriate written justification, detailing one of the following circumstances:

a. **“The following vendor(s) were contacted and refused to accept the purchase card.”** This statement is the only one that may preclude the use of the purchase card. The requiring customer shall identify at least two vendors contacted who refused the acceptance of the purchase card (only one vendor required on sole source requirements). If the buyer, at the supporting purchasing office, locates a vendor that will accept the purchase card, the purchase request shall be returned to the requiring customer to utilize their purchase card and complete the transaction. Prior to issuing any type of award/order valued at or below \$2500, the supporting purchase office is responsible for preparing and obtaining the approval of a written determination. The only written determination authorized for processing purchase orders, orders under task and delivery order contracts, orders under basic ordering agreements or calls against blanket purchase agreements, (when not utilizing the purchase card on a stand alone basis or as the method of payment) is, “the source or sources available for the supply or service do not accept the purchase card and the contracting activity is seeking a source that accepts the purchase card.”

b. **“The requested supply or service requires written terms and conditions”**. The requiring customer shall list the written terms and conditions and reasons therefore. The purchase request shall also state if the Government Commercial Purchase Card will be used as the method payment. The purchase request shall state the name and telephone number of the cardholder.

c. For more information contact the Director of Simplified Acquisition Procedures (SAP) and Operations.

ACCOMMODATION CHECKS.

a. NAVSUPINST 4200.94 and Policy Letter PC00-07, dated 6 Dec 99, provides guidance on the establishment and use of accommodation check accounts. For more information contact the Director of SAP and Operations.

b. Definitions.

1. **Accommodation Checks:** An alternative to cash, third party drafts and U.S. Treasury checks to be used in instances where the use of the purchase card is impracticable.
2. **Accommodation Check Cashier:** The person authorized to sign and issue accommodation checks on behalf of the command/activity.

3. **Accommodation Check Custodian:** The person authorized to order, receive, store, issue, inventory, reconcile and dispose of accommodation check stock.
- c. **Establishing Accommodation Check Accounts.** Prior to establishing an accommodation check account, the command/activity must have an active purchase card program in place.
- d. **Accommodation Check Use.**
 1. Accommodation Checks may only be used after the command/activity has made every attempt to use the purchase card.
 2. The maximum amount accommodation checks may be used for is \$2,500 (\$10,000 overseas in support of contingencies declared by the Secretary of Defense).
 3. More than one checking account is allowed per installation: however the number of checkbooks shall be limited to as few as feasible, and may not exceed one per DOD tenant activity or autonomous location.
 4. Each accommodation checking account shall be audited yearly.
- e. **Financial considerations for use with the Accommodation Checks.**
 1. Activities are responsible for all cost associated with the accommodation check program. Activities must pay 1.25 percent of the check amount for each convenience check issued.
 2. Accommodation check accounts shall be bulk funded.

LETTERS OF AGREEMENT

The Contract Department of Fleet & Industrial Supply Center, Jacksonville can provide our valued customers with a new, efficient method to procure supplies valued \$2,500 to \$25,000 using the Government Purchase Card. The method incorporates the use of an ordering instrument known as Letters of Agreement (LOAs). The LOA permits the cardholder to:

- a. Easily identify sources of supply
- b. Place oral orders with frequently used small businesses
- c. Benefit from discounts offered by contractors through LOAs

LOAs are awarded to small businesses for supplies. If you have a small business that you use as a source of supply, you may request that a LOA be solicited from that vendor. Additional LOAs may be solicited if a commodity that you frequently use is not covered by an existing LOA.

Purchase Cardholders who will use the LOAs to purchase supplies over the micro-purchase threshold of \$2,500 must have attended a Simplified Acquisition Procedures course. The PMR Detachment Charleston conducts this 4-day course. They periodically conduct this course at NAS Jacksonville. If you are interested in attending, notify the FISC Jacksonville Contracting Department at (904) 542-1250 or DSN 942-1250 for the schedules.

If using an LOA the activity must have:

1. The cardholders' Agency Program Coordinator (APC) raise the transaction limit of the cardholders that will use the LOAs.
2. The Purchase Cardholders placing call orders against LOAs obtain a warrant meeting the Government Purchase Card's newly established transaction limit.
3. Obtain purchase card authority from their major claimant that allows the use of the purchase card over the micro-purchase (purchase card plus authority).
4. The purchase cardholder compete the requirement amongst at least three LOA vendors to ensure adequate price competition and reasonableness.

Any questions regarding the process of LOAs contact (904) 542-1250 or DSN 942-1250 for additional information.

INFORMATION TECHNOLOGY (IT) REQUIREMENTS.

a. The focus of the Information Technology (IT) policy has changed from Life Cycle Management (LCM) to IT Capital Planning and Information Technology Acquisition Management (ITAM). Field activity authority for IT acquisition is conveyed through approval of an annual Information Technology Infrastructure Abbreviated Acquisition Program (ITIAAP) Plan. The required ITAM documentation for these requirements is an ITIAAP plan. IT requirements includes computer hardware and software, data, or telecommunications that performs functions such as collecting, processing, transmitting and displaying information.

b. Documentation Requirements for IT Requisitions Submitted for Processing

1. For SAP Requirements (up to \$100,000)

The statement on each requisition that it is IAW (activity's) approved annual ITIAAP plan.

2. For Large Purchase Requirements (greater than \$100,000)

A copy of the first page and the signature page of the activity's approved annual ITIAAP plan.

3. In addition to the above IT policy, the Navy-Marine Corps Intranet (NMCI) contract was awarded on October 6, 2000 and commands will begin to transition from their current network to NMCI. The NMCI contract contains a wide range of Contract Line Items (CLINs) which may potentially be ordered. Only some of these are fully defined and priced at this time: CLINs 0001-0003, 0016-0018, 0020-0022 and 0024-0027, covering basic and enhanced fixed and portable seats, enhanced connectivity, and moves, adds and changes. Flag/SES level reviews of IT requirements covered by these CLINs are required. For priced CLINs and description go to www.eds.com/nmci/catalog.htm. For the remainder of NMCI contract CLINs, further contractual steps must be taken before an order may be issued. The NMCI contract is not a mandatory or preferred source for these requirements and DON activities may obtain these requirements from other sources. Accordingly, Flag/SES level reviews are not required for these requirements although NMCI should be considered as an available source in acquisition planning. If a review concludes that a requirement may be satisfied by other than the NMCI contract because it is clearly needed before it can be delivered under the NMCI contract, verification by the PCO that the NMCI contract schedule cannot be modified is not required. This restriction applies to GSA Schedule orders and delivery orders under Indefinite Delivery Type contracts as well as new purchase orders and contracts. Requisitions submitted without the appropriate review and approval shall be returned. Exceptions to this review are listed on the sample IT Review and Approval Form provided as encl. (2). NAVSUP claimant activities (NAVICP, FISCs, FOSSAC, FMSO, NAVTRANS, etc) shall submit their internal IT requirements over \$25,000 for review to NAVSUP. Non-NAVSUP claimant activity's requirements will be reviewed within the activity's chain of command, whether the activity will be purchasing the items directly or submitting a requisition to another activity. See encl. (5) for sample IT Review and Approval Format.

ITEMS REQUIRING SPECIAL ATTENTION

Advance Payments
Advertising
Airlift Assets
Asbestos and Asbestos-Containing Materials
Black Oxide Coated Brass Threaded Fasteners
Calling Cards, Business Cards and Employee Identification
Christmas Decorations and Other Seasonal Decorations
Coffee Pots, Coffee, Refreshments, Beverages, Bottled Water
Commercial Vehicles, Purchase of
Commercial or GSA Vehicles, Rental/Lease of (without drivers)
Commercial Vehicles with Drivers for the purpose of Transporting Supplies or Personnel, Rental of
Construction and other NAVFAC Services/Supplies
Exchange of Personal Property
Information Technology (IT) Resources
Fireworks Display
Hazardous Material and Hazardous Waste Disposal Contracting
Incentive Music and Equipment
Industrial Plant Equipment
Investment Items
Lodging and Meals
Luggage
Medical and Dental Care at Civilian Non-Federal Sources
Membership Dues
Navy Exchange Purchases
Ozone Depleting Substances (Class I)
Personal Services
Pesticides
Plaques, Ash Trays, Christmas Cards, Paperweight, and Other Mementos as Give-Away Items
Plastics Aboard Ship
Post Office Box Rental
Printing and Duplication
Purchase from Government Employees or Business Owned or Controlled by Government
 Employees
Radiographic Equipment
Sensitive Compartmented Information in Contracts
Service Contracts Crossing Fiscal
Shipboard Habitability Equipment, including Furniture, Laundry/Dry Cleaning and Food Service
 Equipment
Telephone Equipment and Services
Training
Transportation, Purchase of
Uniform Items
Visual Information (VI) Equipment and Material
Visual Information/Audiovisual, (AV) Production including Interactive Video (IVD)
 Acquisition
Visual Information/Acquisition of Commercial Off-The-Shelf Visual Information (VI)
 Productions
Withdrawal of tax-free Ethyl and Specially Denatured Alcohol

Encl (1)

LEASE-PURCHASE JUSTIFICATION

GENERAL INSTRUCTIONS

1. Completion of this form is required for all rental/leases, regardless of dollar value.
2. If the requested lease period is less than 60 days, complete only Question 6 of Part I plus all of Part II and return the form to FISC.
3. If the purchase price of the item to be leased is less than \$100,000 or the item has a useful life of less than two years, only Part I needs to be completed and returned. Please note that the purchase price of the item is the cost to buy the item outright, and NOT the estimated rental cost.
4. There are two determinations that must be completed prior to requesting a lease: (a) the "Lease versus Purchase Determination" and (b) the "Capital versus Operating Lease Determination."

A. LEASE VERSUS PURCHASE DETERMINATION

In accordance with FAR 7.4, agencies should consider whether to lease or purchase equipment based on an evaluation of comparative costs. Since you believe that it is in the best interest of the Government to lease the items, you must justify this decision. Part I of this form must be completed to provide this justification information. When completing Part I, consider the following:

There are generally two different lease methods commonly requested by DoD activities: (1) a straight lease and (2) a lease with the option to purchase.

Straight Lease: A lease that provides for a specific period of performance, after which the Government has neither ownership of the item nor an option to purchase the item.

Lease with the Option to Purchase: A lease that includes provisions for Government purchase of the item at any time during the lease period of performance. This typically includes application of a portion of the lease payments towards the purchase price of the item.

A third type of lease method, lease to own, also exists. However, DoD activities do not utilize this method. Lease to own procedures transfer ownership of the leased item to the Government at the end of the lease period, at no additional purchase cost. Therefore, the Government is not really leasing the item, but simply making installment payments.

B. CAPITAL VERSUS OPERATING LEASE DETERMINATION

Part II of this form addresses capital versus operating leases. If the item you want to lease has a purchase price over \$100,000, has a useful life of over two years, and any one of the four of the following circumstances exist, you are requesting a capital lease:

1. The lease transfers ownership of the property to the Government at the end of the lease.
2. The lease contains an option to purchase at a bargain price.
3. The total lease period exceeds 75% of the useful life of the item.
4. The total lease payments, less maintenance and transportation costs, exceed 90% of the purchase price.

Encl (2)

Otherwise, you are requesting an operating lease.

Please keep in mind that a capital lease requires capital/investment (OPN) funding for all lease payments, as well as for the purchase price. An operating lease allows for payment of lease monies with expense or operating (O&MN) funds.

**PART I - LEASE VERSUS PURCHASE INFORMATION (Requiring Activity
Completes)**

1. Item to be leased/rented:

2. Which current Government inventories were checked for availability of the required equipment?
When?

3. Why is the equipment needed and why must it be leased/rented instead of purchased.
Please keep in mind that a lack of funding does not justify leasing.

(Examples: obsolescence of equipment due to technological advances, lack of maintenance capability, etc.)

4. What is the expected lease period (i.e., 6 months, 12 months, etc.)? _____

What is the anticipated extent of usage during the lease period(i.e. 24 hrs a day / 7 days a week)? _____

5. Are there any financial or operating advantages of alternate types/makes of equipment.____ If yes, please explain.

6. Please provide market research information regarding the availability and cost of leasing/purchasing the required equipment. (If more than one type of equipment is required, provide market research information on all.)

Company	#1	#2	#3
POC & Telephone No.			
Useful Life of Equipment			
Monthly Rental/Lease Cost			
Portion of Monthly Cost Applicable to Maintenance			
Portion of Monthly Cost Applicable to Transportation			
Total Rental/Lease Cost			
Purchase Cost (less scrap or salvage value)			

If total lease costs (less maintenance and transportation costs) exceed the purchase price (considering estimated scrap or salvage value at the end of the useful life), the higher cost of leasing must be justified and proven to be in the best interest of the Government. Please provide information that supports your request.

Describe the Government's scrap or salvage value of the owned equipment at the end of its estimated useful life. If the equipment can be refurbished (and its useful life thereby extended), what would be the estimated cost of that future overhaul and the addition to the useful life.

PART II- CAPITAL VERSUS OPERATING LEASE (Requiring Activity Completes ONLY if the purchase price of the item is over \$100,000.)

1. Does your request include an option to purchase? Yes____ No____
2. Is the lease term (length of time for rental) equal to 75% or more of the useful life of the item? Yes____ No____
3. Do the total lease payments (less the maintenance and transportation costs) exceed 90% of the purchase price? Yes____ No____

IF YOU ANSWERED YES TO ANY OF THE ABOVE QUESTIONS YOU HAVE REQUESTED A CAPITAL LEASE AND MUST PROVIDE CAPITAL FUNDS FOR BOTH THE LEASE PAYMENTS AND ANY APPLICABLE PURCHASE OPTION PRICE.

4. Are capital funds available for this requirement? Yes____ No____

5 Verified capital funding for this requirement with _____

Name Code Phone

To the best of my knowledge, the above information is current, accurate, and complete.

Printed Name, Title, Code, and Phone Number of Preparer:

Signature of Preparer:_____

PART III- CONTRACTING OFFICER'S DETERMINATION (To be completed by FISC)

_____ The customer has completed PART I and has adequately justified that leasing is in the best interest of the Government and has insured that sources of excess Government property have been screened.

_____ PART I was not adequately documented by the requiring activity; therefore, the following additional information is provided in support of the lease determination:

_____ Completion of PART I is not required as the lease timeframe is less than 60 days.

_____ The customer has completed PART II and has demonstrated that appropriate funds are available for the CAPITAL or OPERATING (circle one) lease.

Availability of capital funds was verified by: _____
Name Title Code Phone

_____ PART II was not adequately documented by the requiring activity; therefore, the following additional information is provided in support of the lease funding determination:

_____ Completion of PART II is not required as the purchase price of the item is less than \$100,000 and the item is, therefore, not a capital asset, in accordance with DoD Financial Management Regulation Volume 2B, Chapter 9, Section 090103, paragraph C. 1.

Based on the above information, the Contracting Officer determines that use of lease/rental procedures rather than purchase is in the best interest of the Government and that appropriate funds are available.

_____	_____	_____	_____
Purchasing Agent/Contract Specialist	Date	Contracting Officer	Date

CONTRACT SUPPORT SERVICE (CSS) CERTIFICATION

1. Requisition number(s): _____

1a. ____ The services specified in the cited requisition(s) ARE NOT contract Support Services as defined by SECNAVINST 4200.31B.

1b. ____ The services specified in the cited requisition(s) ARE NOT Contract Support Services and fall into the following category:

Check one	Category	Cost Accounting Code	DD350 Code
____	Individual Experts and Consultants	_____	_____
____	Studies, Analyses and Evaluations	_____	_____
____	Management Support Services	_____	_____
____	Engineering and Technical Services	_____	_____
____	Information Technology Systems	_____	_____
____	Systems Engineering	_____	_____
____	Federally Funded Research and Development Centers	_____	_____

2. The required services do not unnecessarily duplicate any previously performed work.

Signature, Typed Name and Title

Justification of need for advisory and assistance services/certification that such services do not unnecessarily duplicate any previously performed work or services (see FAR 37.206 and DFARS 237.206(c)).

Encl. (3)

Date_____

MEMORANDUM FOR SIMPLIFIED ACQUISITIONS (<\$100K)

From:_____

To: Contracting Officer, Fleet and Industrial Supply Center Jacksonville

___Subj: **JUSTIFICATION FOR SOLE SOURCE ACQUISITION OF**

Ref: (a) Procurement Request No.(s)_____

(b) Federal Acquisition Regulation 6.302-1

1. **SOLE SOURCE:** This justification is provided to support contracting without full and open competition for subject requirement as authorized by 10 U.S.C. 2304(c)(1) in that the supplies or services are available from only one responsible source and no other type of supplies/services will satisfy the minimum needs of this agency. This determination is based on the following facts:

___Specifications/drawings (attached) contain **proprietary** or **restricted** use legends.

___This is a one-time buy making reverse engineering costs prohibitive.

___The restrictive rights legend will be challenged.

________ is the **only** source of supply. The following firms were contacted and have indicated that they cannot provide an item that will meet the needs of the Government.

(Company Name)	(Person Contacted)	(Date of call)	(Reason*)
(Company Name)	(Person Contacted)	(Date of call)	(Reason*)
(Company Name)	(Person Contacted)	(Date of call)	(Reason*)

*Possible reasons that a firm could not provide a supply or service include it is something the company does not manufacture, their product line does not meet the minimum performance requirements of the Government, they could not meet the Government's delivery requirement and/or other similar reasons.

___This is an aircraft/ship repair part/service that is **available only from** the original equipment manufacturer. Award to any other source would pose safety of flight issues/shipboard safety issues/shipboard habitability and/or would result in unacceptable delays in fulfilling the requirement.

___ Action will be implemented to identify additional sources for future buys.

___ Action cannot be taken to establish additional sources because

___ Action taken to establish NSN when applicable.

___ Supply or service is required to be delivered by _____. Any delay in delivery beyond that date would preclude mission readiness by _____.

___ Additional comments (if any)

2. I hereby certify that the above information is accurate and complete to the best of my knowledge and belief.

Submitted: _____ APPROVED: _____

(Technical)/(Equipment Specialist)

(If required) Activity Competition Advocate

Reviewed: _____ APPROVED: _____

(Requirement)/(Supervisor)

(Supervisory Contracting Officer)

JUSTIFICATION FOR URGENCY ON REVERSE

Encl (4)

Date _____

MEMORANDUM FOR SIMPLIFIED ACQUISITIONS (<\$100K)

From: _____

To: Contracting Officer, Fleet and Industrial Supply Center Jacksonville

Subj: **JUSTIFICATION FOR URGENT ACQUISITION OF**

Ref: (a) Procurement Request No(s) _____
(b) Federal Acquisition Regulation 6.302-2

2. **URGENCY:** This justification is provided to support contracting without full and open competition for subject requirement as authorized by 10 U.S.C. 2304(c)(2) in that the supplies or services is of such unusual and compelling urgency that the Government would be seriously injured unless the agency is permitted to limit the number of sources from which it solicits bids or proposals. This determination is based on the following facts:

___ Date on which the requirement was first identified. _____
___ Date on which the requirement was submitted. _____
Required delivery date. _____
___ Explanation of why delivery by that date is required. _____

___ Explanation of what impact delays in delivery would have on the activity. (Note: Delays in production schedules alone or failure to expend monies are not acceptable reasons for justifying urgency.)

___ Estimated production lead time for the item (how long will it take the contractor to produce the item once he gets a contract) _____
___ If the requirement is urgent and includes options, why are the options also urgent? _____

The following firms were contacted and have indicated that they cannot provide an item that will meet the needs of the Government.

_____ (Company Name)	_____ (Person Contacted)	_____ (Date of call)	_____ (Reason*)
_____ (Company Name)	_____ (Person Contacted)	_____ (Date of call)	_____ (Reason*)
_____ (Company Name)	_____ (Person Contacted)	_____ (Date of call)	_____ (Reason*)

*Possible reasons that a firm could not provide a supply or service include it is something the company does not manufacture, their product line does not meet the minimum performance requirements of the Government, they could not meet the Government's delivery requirement and/or other similar reasons.

3. I hereby certify that the above information is accurate and complete to the best of my knowledge and belief.

Submitted: _____ APPROVED: _____
(Technical)/(Equipment Specialist) (If required) Activity Competition Advocate

Reviewed: _____ APPROVED: _____
(Requirement)/(Supervisor) (Supervisory Contracting Officer)

FORMAT FOR JUSTIFICATION AND APPROVAL (J&A)

1. IDENTIFICATION OF AGENCY AND CONTRACTING ACTIVITY: The requiring activity is **(insert name of appropriate requiring activity)**; the contracting activity is the Fleet and Industrial Supply Center, Jacksonville, FL.

2. NATURE/DESCRIPTION OF ACTION: This is a **(insert "sole source," or "limited competitive," as appropriate)** action to be awarded as **(insert "a new contract," "an extension of Contract N68836-00-C-0000," or "an add-on to Contract N68836-00-C-0000," as appropriate)** **(if sole source, insert "to (the proposed contractor's name and location)."** **For limited competitive procurements insert the following"** Offers will be solicited from **(insert specific contractor names and locations if known or, if specific sources are not known, insert "all known potential sources")**. A **(insert type of contract)** contract is anticipated.

3. DESCRIPTION OF SUPPLIES/SERVICES: **Insert a reasonably descriptive explanation of what is being bought to enable the reader to have a succinct understanding of what it is, what its purpose is, or for what it is being used.**

4. IDENTIFICATION OF STATUTORY AUTHORITY: The statutory authority permitting other than full and open competition is **(insert one, only, of the following)**:

a. 10 U.S.C. 2304(c)(1), Only One Responsible Source and No Other Supplies or Services Will Satisfy Agency Requirements, as implemented by FAR 6.302-1.

b. 10 U.S.C. 2304(c)(2), Unusual and Compelling Urgency, as implemented by FAR 6.302-2.

c. 10 U.S.C. 2304(c)(3), Industrial Mobilization; or Engineering, Developmental, or Research Capability, as implemented by FAR 6.302-3.

d. 10 U.S.C. 2304(c)(4), International Agreement, as implemented by FAR 6.302-4.

e. 10 U.S.C. 2304(c)(5), Authorized or Required by Statute, as implemented by FAR 6.302-5.

f. 10 U.S.C. 2304(c)(6), National Security, as implemented by FAR 6.302-6.

g. 10 U.S.C. 2304(c)(7), Public Interest, as implemented by FAR 6.302-7.

h. 10 U.S.C. 2304-(g), Test Program for Certain Commercial Items, as implemented by FAR 13.5.

5. DEMONSTRATION OF CONTRACTOR'S UNIQUE QUALIFICATIONS: **This paragraph represents the "heart" of the J&A and should be comprehensive. If the requirement can be filled only by unique supplies or services available from only one**

source or limited sources, be sure to address in full the unique qualifications of the sole source or the limited sources. Describe what is so unique about the requirement. Identify what specific capabilities, equipment, knowledge and/or experience the suggested source has that make it the only firm that is able to provide the required supplies or services.

In the case of urgency, fully address the compelling nature of the urgency and how the Government would be seriously injured unless the agency is permitted to limit the number of sources from which it solicits bids or proposals. List the date on which the requisition was submitted. Are any delays fully explained? Is the required delivery date stated? Is there an explanation of why that delivery date is required? Is the estimated production lead time for the item stated?

Describe how the government would be injured and what the financial implications might be. Examples: Supplies or services needed at once because of fire, flood, hurricane or other disaster. Supplies or services required to repair roofs or windows to prevent water damage or destruction of computer, office areas, personnel records, etc. Essential equipment or repair needed at once to comply with orders for a ship in order for it to deploy or for an aircraft which is grounded and as a result the Navy cannot perform its mission. Essential equipment or repair needed at once to: Examples: (i) prevent work stoppage of _____ employees at an average hourly rate of \$_____; or (ii) repair the AN/AIR-67 Electronic Counter Measuring System. Failure to repair would result in replacement of the system an estimated cost of \$_____. Explain why the urgency could not have been overcome by advance planning. Contracting without providing for full and open competition shall not be justified on the basis of a lack of advance planning by the requiring activity or concerns related to the amount of funds available to the agency or activity for the acquisition of supplies and services (e.g., funds will expire).

6. CBD ANNOUNCEMENT/POTENTIAL SOURCES: Provide a narrative description of the efforts being made, including whether the acquisition has been or will be synopsized in the *Commerce Business Daily* as required by FAR 5.2, or if not, which exception under 5.202 applies. For procurements in accordance with 10

U.S.C. 2304(c)(2), insert the following statement: The synopsis requirements for FAR 5.201 are hereby waived, pursuant to the authority cited at FAR 5.202(a)(2), since the contract action is being processed under the conditions set forth at FAR 6.302-2 and the Government would be seriously injured if the agency complies with the time periods in FAR 5.203.

7. DETERMINATION OF FAIR AND REASONABLE COST: The Fleet and Industrial Supply Center, Jacksonville Contracting Officer will determine that the price negotiated for this acquisition is fair and reasonable pursuant to FAR, Part 15.

8. DESCRIPTION OF MARKET SURVEY: Describe the market survey that was conducted or reasons why a survey was not conducted. "Market survey" means attempts to ascertain whether other qualified sources capable of satisfying the Government's minimum requirements exist. This testing of the marketplace may range from written or telephone contacts with knowledgeable federal and non-federal experts

regarding similar or duplicate requirements, the results of any market test recently undertaken or the more formal "sources-sought" announcement is pertinent (e.g., technical/scientific journal or the *Commerce Business Daily*). Routine pre-solicitation synopsis in the *Commerce Business Daily* as required by Part 5 of the FAR does not constitute a market survey.

9. ANY OTHER SUPPORTING FACTS: Include any other facts supporting the use of other than full and open competition. The following items must be addressed when applicable:

a. Explanation of why technical data packages, specifications, engineering description, statements of work, or purchase description suitable for full and open competition have not been developed or are not available, the following questions should be considered in preparing your statement on the subject:

(1) Does your activity possess a complete technical data package?

(2) If not, is there a technical data package that is in the possession of some other organizational element of the Navy?

(3) Does your activity have a technical data package which contains restrictive legends?

(4) Was the technical data package acquired under a DOD contract containing the standard general provision covering rights in technical data?

(5) Is there any question as to whether a restrictive legend has been applied in a manner which is consistent with the requirements of the standard general provision covering rights in technical data?

(6) Has an effort been made to obtain permission from the supplier of the data to use the data notwithstanding the restrictive?

(7) Is the specific acquisition of data developed at private expense necessary in order to obtain a complete technical data package suitable for full and open competition? Would this be of economic value for future acquisitions?

b. When 6.3302-1 is cited for follow-on acquisitions as described in 6.302-1(b)(2), an estimate of the cost that would be duplicated and how the estimate was derived is required.

c. When 6.302-2 is cited, clear rationale as to the extent and nature of the harm to the Government should be addressed. Unusual and compelling urgency must be defined so that it is clear that the Navy would suffer undue harm (i.e., cost, safety hazard, loss of life) if the acquisition is processed under full and open competition procedures.

10. LISTING OF INTERESTED SOURCES: **Provide a listing of the sources, if any, that expressed, in writing, an interest in the acquisition.**

11. ACTIONS TAKEN TO REMOVE BARRIERS TO COMPETITION: **Provide a statement of the actions, if any, the agency (i.e., the Navy) may take to remove or overcome any barriers to competition before any subsequent acquisition for the supplies or services occurs. This paragraph should address good faith efforts being made to enhance competition on future acquisitions and should demonstrate an honest attempt to overcome barriers to competition. It is insufficient to state that future requirements for your activity cannot be predicted if the supply or service is one which is used by other activities in the Navy.**

12. STATEMENT OF DELIVERY REQUIREMENTS: **For supply contracts insert "Delivery under proposed contract is required" (insert delivery requirements). For service contracts insert "Services under proposed contract will be performed during the period" (insert period of performance).**

13. TOTAL ESTIMATED DOLLAR VALUE OF THE ACQUISITION COVERED BY THIS J&A: **Include the total estimated dollar value for the acquisition, including options, broken down by fiscal year and appropriation.**

14. REFERENCE TO THE APPROVED ACQUISITION PLAN (AP): **If not applicable, so state; otherwise, provide reference to the approved AP when the acquisition(s) covered in the justification meet the criteria/thresholds for a written AP (see DFARS 207.103(c)(i)). In addition, a copy of the approved AP shall be attached to each justification requiring higher headquarters approval at the time the justification is submitted for approval. If the cost information contained in the approved plan is not current and complete at the time the justification is submitted for approval, an updated cost information sheet shall be provided concurrent with and separate from the justification. If the other information contained in the approved AP is not concurrent and complete at the time the justification is submitted for approval, updated AP replacement pages shall be provided with the justification. Each AP replacement page shall contain a current date, the AP number and the justification number. In the event that the AP changes are significant/extensive, consideration should be given to preparing a complete AP update. For those clearly noncompetitive acquisitions such as follow-on buys of certain weapon systems, the justification along with any required AP may be submitted for concurrent approval.**

15. DOCUMENTATION FOR SPARE/REPAIR PARTS: **Provide documentation of a review of the specifications to ensure that they reflect the minimum requirements.**

16. IDENTIFICATION OF THE CONTRACT SPECIALIST WHO PREPARED THE DOCUMENT: **Prepared by Fleet and Industrial Supply Center, Jacksonville, FL., contract specialist (insert contract specialist's name and code), who can be reached at (insert commercial and DSN telephone numbers) and (insert email address).**

TECHNICAL AND REQUIREMENTS CERTIFICATION REQUIRED BY FAR 6.303-2(b):

I certify that the facts and representations under my cognizance which form a basis for this justification are complete and accurate.

Technical Cognizance:

_____	_____	_____	_____
(Name and Title)	(Code)	(Telephone)	(Date)

Requirement Cognizance:

_____	_____	_____	_____
(Name and Title)	(Code)	(Telephone)	(Date)

Review and Approval Required by NAVSUPINST 4200.83B

_____	or	_____
Commanding Officer		Competition Advocate - Requiring Advocate

Information Technology-Related Procurement Review and Approval

Activity: _____

Procurement Description:

Procurement Dollar Value:

Procurement Award Date:

This IT Procurement is in excess of \$25,000 and does not include requirements for:

- A. Local voice services
- B. Top Secret or compartmentalized information
- C. Cryptologic-related activities related to national security systems
- D. Computer resources (hardware and software) that are physically part of, dedicated to, and essential to the performance of a weapons systems or shipboard system associated with the IT-21 effort.

NOTE: Embarkable/deployable workstations, portable computers, laptop computers, etc. are not included in the above exemptions.

_____ Waiver to use other than the NMCI contract is approved based on IT capabilities being unavailable under the NMCI contract.

_____ Waiver to use other than the NMCI contract is approved based on the requirement being essential to the successful execution of a command program initiative that is clearly needed before it can be delivered under the NMCI contract.

_____ Waiver to use other than the NMCI contract is approved for IT services for which the period of performance will expire before transition to the NMCI contract, (or a reasonable time thereafter as agreed by the NMCI Government Management Office and requesting official (see attached email, FAX, etc. agreement by the NMCI GMO)).

Approved:

Flag Officer/SES

Date

Encl (5)

DOCUMENTATION FORM FOR CONTRACT ADMINISTRATION PLAN

Ref: (a) NAVSUPINST 4330.725

Due to the nature of the effort described in Request for Contractual Procurement (RCP)/Purchase Request(PR) document number _____ for _____ type of services, specialized technical expertise is needed to ensure satisfactory contract completion. In accordance with reference (a), the following information is provided for use in developing the Contract Administration Plan (CAP) for the resulting contract.

Part I (To be completed by the Requiring Activity)

	YES	NO	REMARKS
1. What type of service is to be acquired: (The complete description is included in the Statement of Work.) Give executive summary below.			
Specify:			
a. Acquiring & Managing Consulting Services (SECNAVINST 42Q0.31C) (If yes, specify category in remarks column)	_____	_____	_____
b. Commercial Activity (CA) (OPNAVINST 4860.75)	_____	_____	_____
c. Mess Attendant Services (NAVSUPINST 4061.SD)	_____	_____	_____
d. Computer Resources Services (SECNAVINST 5231.1C)	_____	_____	_____
e. Commercial Industrial Services (CIS) (NAVSEA TQ300-AA-MMI-010/CIS Manual)	_____	_____	_____
f. Other (Specify)	_____	_____	_____
2. What areas of effort require specific Technical expertise to ensure efficient Contract administration?			
a. Monitoring contractor performance	_____	_____	_____
b. Technical guidance to contractor during performance	_____	_____	_____
c. Inspection criteria/determination of acceptability	_____	_____	_____
d. Drafts of data deliverables/reports	_____	_____	_____
e. Special personnel coordination	_____	_____	_____
f. Other (Specify)	_____	_____	_____

Encl (6)

	YES	NO	REMARKS
3. What activity in-house expertise is available to assist in the contract administration?			
a. Project Manager (Name & Position)	_____	_____	_____
b. Ordering Officer (Specify)	_____	_____	_____
c. Contracting Officer's Representative (COR) Attach nomination letter)	_____	_____	_____
d. Technical Specialist	_____	_____	_____
e. Other (Specify)	_____	_____	_____
4. Where will the contractor be required to perform?			
a. On Government Installation	_____	_____	_____
b. Contractor's Site	_____	_____	_____
c. Various locations (Attach a list specifying locations)	_____	_____	_____
FOR INDEFINITE DELIVERY TYPE CONTRACTS (IDTCs) COMPLETE THE FOLLOWING:			
5. Who will prepare the task order SOW(s)?			
a. Technical Specialist	_____	_____	_____
b. COR	_____	_____	_____
c. Various individuals for the COR (Identify individuals)	_____	_____	_____
d. Various individuals for the Ordering Officer (Identify individuals)	_____	_____	_____
e. Other (Specify)	_____	_____	_____
6. Who will prepare the INDEPENDENT Government estimate?			
a. COR	_____	_____	_____
b. Other (Specify)	_____	_____	_____
7. Who will provide the appropriate accounting and appropriation data? Specify how.			
8. What type of funding is to be provided?			
9. Who will request a proposal for an order if one is needed? Specify how.			

10. Who will review the proposal?
11. Who will issue the task orders?
12. Who will inspect the services?
13. Who will accept the services on behalf of the government?

SIGNATURES

DATE

Prepared by: _____

Reviewed by: _____

Approved by: _____

The above responses describe the extent of expertise and availability within this activity. They are to be considered by the PCO in developing the Contract Administration Plan (CAP) . I agree that successful contract administration will require the expertise available at this activity.

Signature: _____
Commanding Officer/OIC or Designee

DATE _____

Typed Name and Title



DEPARTMENT OF THE NAVY

FLEET AND INDUSTRIAL SUPPLY CENTER
JACKSONVILLE, FLORIDA 32212-0097

IN REPLY REFER TO:
SSIC
Code/Serial
Date

From: Commanding Officer of requiring activity
To: PCO of the applicable NFCS activity

Subj: **NOMINATION OF CONTRACTING OFFICER'S REPRESENTATIVE**

Ref: (a) NAVSUPINST 4205.3B, "Contracting Officer's
Representative (COR)

1. Pursuant to reference (a), I hereby nominate
Mr./Mrs./Ms. _____ as the Contracting Officer's
Representative (COR) for the contract resulting from requisition
number _____ to acquire _____ supplies/services
in support of _____.

2. Mr./Mrs./Ms. _____ qualifications are: _____.

3. Mr./Mrs./Ms. _____ title, code, business address, and
phone number are:

4. In case of any problems, disagreements, or other questions
pertaining to the COR's performance of duties you may contact
_____.

5. Mr./Mrs./Ms. _____ has/has not completed Navy
approved COR training. He/she attended/is scheduled to attend
the COR course in (month. year).

6. The individual performance rating elements of
Mr./Mrs./Ms. _____ include/do not include the COR
function (if not, why not).

7. If an alternate COR (ACOR) is to be appointed to act in the
absence of the COR, also provide the information requested in
paragraphs 1 through 6 for the ACOR.

8. I recommend that the COR be assigned the following duties:

a. Control all Government technical interface with the
contractor.

b. Ensure that a copy of all Government technical
correspondence is forwarded to the contracting officer (ordering

Encl (7)

officer) for placement in the contract (delivery/task order) file.

c. Promptly furnish documentation on any requests for change, deviation, or waiver, whether generated by the Government or the contractor, to the contracting officer (and ordering officer) for their action.

d. Determine causes when the contract is not progressing as expected and make recommendations to the contracting officer for corrective action.

e. Monitor contractor performance to ensure individual contractor employees are of the skill levels required and are actually performing at the levels charged against the contract during the performance period.

f. Monitor contractor performance to ensure that the labor hours charged against the contract are consistent and reasonable for the effort completed and that any travel charged was necessary and actually occurred.

g. Monitor Government Furnished Property. Ensure that property provided the contractor is authorized by the contract.

h. Complete the COR Report of Contractor's Performance in accordance with the schedule established in the contract administration plan for the contract.

9. Any changes to these recommended duties must be discussed with the undersigned prior to issuing the appointment letter.

Signature of Commanding Officer or Designee

SAP PROCUREMENT PLAN

From: Contracting Officer, Fleet and Industrial Supply
Center, Jacksonville

To: _____

Ref: (a) NAVSUPINST 4200.85C, Chap. 4, para 4e, pg 4-6
(b) FAR 5.203(a)(1) and (2)

Subj: PROCUREMENT PLAN FOR REQUISITIONS(S) _____
FOR _____

Encl: (1) (examples) Signed acceptance copy of 2276,
Revised SOW,etc.

The standard procurement lead time for a Simplified Acquisition Procurement (SAP) is 45 days. In accordance with references (a) and (b), All, unless an exception at FAR 5.202 applies, requirements in excess of \$25,000 must be synopsized, which is included in this lead time. However, based on the needs of your activity, our office will make every effort to have a contract in place by _____. Per our telephone conversation of (date), the agreed acquisition timeline to process your requirement is shown below:

Receipt Date	_____
Synopsis Date	_____
Request For Quote (RFQ)	_____
Issue Date	_____
Closing Date	_____
Award Date	_____

2. I will be your point of contact for this procurement and will be in contact with your office throughout this process. If you have any questions, please do not hesitate to contact me. I can be reached at (904) 542-____ or DSN 942-____ or fax (904) 542-____ or e-mail _____.

Contracting Officer

Encl (8)

LARGE PURCHASE ACCEPTANCE MEMO AND PROCUREMENT PLAN

From: Contracting Officer, Fleet and Industrial Supply
Center, Jacksonville

To: _____

Ref: (a) FAR 7.105 (b)(20)

Subj: ACCEPTANCE WITH PROCUREMENT PLAN FOR REQUISITIONS)
_____ FOR _____

Encl: (1) (if required, i.e.) Signed acceptance copy of
2276, Revised SOW, etc.

Per our (telephone conversation of (date) or (meeting of
(date)), the agreed acquisition milestones to process your
requirement, as proscribed in Reference (a) is shown below:

	Planned Date
Receipt Date	_____
Acceptance Date	_____
Synopsis Date	_____
Solicitation	
Issue Date	_____
Closing Date	_____
Oral Presentation Date	_____
Evaluation Complete	_____
Negotiation	
Beginning Date	_____
Completion Date	_____
Contract Preparation,	
Review, Clearance	_____
Award Date	_____

2. I will be your point of contact for this procurement and
will be in contact with your office throughout this process.
If you have any questions, please do not hesitate to contact
me. I can be reached at (904) 542-____ or DSN 942-____ or fax
(904) 542-____ or e-mail _____.

Contracting Officer

Encl (9

FISC JACKSONVILLE NOTICE 4235

To: Distribution List

Subj: **PROCUREMENT PLANNING AND CUTOFF DATES FOR FY01**
REQUISITIONS REQUIRING PURCHASE OR CONTRACTING ACTION

Ref: (a) NAVSUPINST 4200.84C
(b) FAR Part 7.103
(c) NAVSUPINST 4200.85C
(d) SECNAVINST 5000.2B
(e) NAVSUP letter 22B/144 of Nov. 27, 2000

Encl: (1) FISCJAX FY01 Requisition Submission Deadlines
(2) FISCJAX Requirement for IT Requisitions
(3) Sample IT Review and Approval Format
(4) FISCJAX Policy for Micropurchases (<\$2500)
(5) FISCJAX Contracting Department Telephone List

1. Purpose. To improve the procurement planning process and help ensure the timely obligation of FY01 customer funds by establishing cutoff dates for receipt of purchase requests (PRs) at FISC Jacksonville and all detachments and sites.

2. Scope. This notice is applicable to all activities that submit PRs to the FISC Jacksonville Contracting Department and all detachments and sites for action.

3. Background. Reference (a) discusses Procurement Administrative Lead Time (PALT) and requires each contracting activity to annually inform its customers of current PALT forecasts and required deadline dates for receipt of purchase requests.

4. Recommendations for Procurement Originators.

a. Submit purchase requests at the earliest possible time, even prior to receipt of funds, if necessary. With proper planning, presolicitation actions can be executed and solicitations readied for issuance as soon as funds are received. The Competition in Contracting Act (CICA) which became effective 1 April 1985 requires, with limited exceptions, that procurements be competed. Competitive procurements take longer to award than non-competitive procurements; hence, the need for adequate procurement lead time is critical to both the purchase of required material and services, as well as, in the timely obligation of customer funding. Reference (b) prohibits Contracting Officers from by-passing competition

Enclosure (10)

due solely to a customer's lack of advanced planning or need to obligate expiring funds. Consequently, it is important that the cutoff dates listed in enclosure (1) be incorporated into your requirements planning process.

b. Ensure that procurement packages are complete and that your requirements are clearly defined. A complete/workable purchase request allows us to provide immediate service to our customer and saves you from expending time and resources on costly rework and re-submissions. All purchase requests must include a description of the required supplies or service adequate to permit competitive acquisition (this includes purchase requests for rental or maintenance of Information Technology (IT). In accordance with reference (c), an adequate purchase description must set forth the item's essential physical and functional characteristics. It should not be unduly restrictive and shall not specify a product peculiar to one manufacturer (e.g., brand name and manufacturer's part number) unless it is essential to the Government's requirements. The minimum acceptable purchase description (competitive) is the identification of a requirement by the use of the words "brand name or equal". (Brand name or equal cannot be used for requirements greater than \$100,000.00.) This method of description should only be used when a more detailed description is not possible and even then, the description must include those salient characteristics of the brand name product that are essential to the Government's needs. Requisitions that cite only a manufacturer's brand name and part number will be returned to the customer for a more adequate description or a sole source statement.

c. If the purchase description you provide limits the availability of the item or service to one source (sole source), the requisition must be accompanied by a full justification explaining why the item is the only one that will meet the Government's needs. This sole source statement must be attached to the requisition. Requirements over \$100,000 require a formal Justification and Approval (J&A) in the format specified in Federal Acquisition Regulation (FAR) Part 6.303-2. Sole source requirements over \$50 million must have the approval of the Commander, Naval Supply Systems Command, Mechanicsburg, PA.

d. As explained in reference (d), the focus of the Information Technology (IT) policy has changed from Life Cycle Management (LCM) to IT Capital Planning and Information Technology Acquisition Management (ITAM). Field activity authority for IT acquisition is conveyed through approval of an annual Information Technology Infrastructure Abbreviated Acquisition Program (ITIAAP) Plan. The required ITAM documentation for these requirements is an ITIAAP plan. See enclosure (2) for FISC JAX requirements for IT requisitions (includes computer hardware and software, data, or telecommunications that performs functions such as collecting, processing, transmitting and displaying information) submitted for processing.

e. In addition to the above IT policy, the Navy-Marine Corps Intranet (NMCI) contract was awarded on October 6, 2000 and commands will begin to transition from their current network to NMCI. The NMCI contract contains a wide range of Contract Line Items (CLINs) which may potentially be ordered. Only some of these are fully defined and priced at this time: CLINs 0001-0013, 0016-0018, 0020-0022 and 0024-0027, covering basic and enhanced fixed and portable seats, enhanced connectivity, and moves, adds and changes.

Flag/SES level reviews of requirements covered by these CLINs are required. For priced CLINs and descriptions go to www.eds.com/nmci/catalog.htm. For the remainder of NMCI contract CLINs, further contractual steps must be taken before an order may be issued. The NMCI contract is not a mandatory or preferred source for these requirements and DON activities may obtain these requirements from other sources. Accordingly, Flag/SES level reviews are not required for these requirements although NMCI should be considered as an available source in acquisition planning. If a review concludes that a requirement may be satisfied by other than the NMCI contract because it is clearly needed before it can be delivered under the NMCI contract, verification by the PCO that the NMCI contract schedule cannot be modified is not required. This restriction applies to GSA Schedule orders and delivery orders under Indefinite Delivery Type contracts as well as new purchase orders and contracts. Requisitions submitted without the appropriate review and approval shall be returned. Exceptions to this review are listed on the sample IT Review and Approval Form provided as enclosure 3. NAVSUP claimant activities (NAVICP, FISC's, FOSSAC, FMSO, NAVTRANS, etc) shall submit their internal IT requirements over \$25,000 for review to NAVSUP. Non-NAVSUP claimant activity's requirements will be reviewed within the activity's chain of command, whether the activity will be purchasing the items directly or submitting a requisition to another activity.

f. After identifying your required delivery date, consider both PALT and manufacturing time or service start-up time to determine the date by which you must submit your purchase request to FISC in order to ensure timely/delivery and obligation of funds. Remember, purchase requests must be submitted early enough to allow sufficient time for the procurement process and manufacturing or start-up time.

g. Requirements over \$25,000, and not available on GSA schedule, take longer to process even under Simplified Acquisition Procedures (SAP). They must be synopsisized for at least 15 days before the Request For Quotation (RFQ) can be issued. The RFQ is open from five (5) to fifteen (15) days, depending on the complexity of the requirement, and all responses must be evaluated, which can take several days. It is not simply a matter of calling three sources for prices and awarding in a day or two, it can take up to 35 to 40 days. Keep this in mind if your requirement is in excess of \$25,000 and not on GSA contract. Our Contracting Officers are available for advanced procurement planning and you are encouraged to communicate your needs to them as early as possible.

h. Establish contract options for subsequent year's requirements to ensure prompt obligation of funds with minimal administrative effort.

i. Purchases less than \$2500 (Micro Purchase) are to be made by the customer using customer Government-wide Commercial Purchase Card (GCPC). Requirements less than \$2500 will only be accepted, with appropriate written justification, to be purchased by FISC, see enclosure (4).

5. Action.

a. Activities should use the PALT and cutoff dates listed in enclosure (1) to plan their

submission of purchase requests. The PALT shown is measured in days from receipt of a proper, complete and workable purchase request as addressed above and represents an average for procurements of that particular type and category.

b. Activities should ensure that their purchase requests are received at this Command no later than the cutoff date established in enclosure (1). These dates allow for the increase in procurement workload normally experienced toward the end of the fiscal year and are not a reflection of normal PALT alone. If an urgent operational requirement necessitating procurement action arises after the applicable cut-off date, the requisition should be delivered directly to the FISC Jacksonville Customer Service Officer along with a description of the circumstances requiring the emergency procurement and exception to the established cutoff date. Each requirement will be reviewed on a case-by-case basis to determine if it can be completed before the end of the fiscal year, and you will be notified accordingly.

c. At the end of each fiscal year, several thousand agreements for rental/lease/maintenance of various equipment and services expire and require renewal on 1 October. In addition, many new requests are submitted. To ensure these requirements are placed in as timely a manner as possible, activities are urged to submit their purchase requests as soon their FY02 purchase requirements are known. These documents should cite FY02 funds with the statement "Subject to the Availability of Funds". Also, please ensure that your FY02 document number uses the Julian date 1274.

6. Our aim is to meet our customers' contracting requirements by getting you what you need, when and where you need it. With proper planning, communications, and teamwork, we will accomplish those expectations.

7. Dissemination. It is requested that this information receive wide dissemination within your command, as well as periodic publication in the Plan of the Day, and posting on command or divisional bulletin boards.

B. J. Warfield
By direction

Distribution:

FISCJAXINST 5605.1J, List B

Special:

FISC Contracting Personnel and FISC Partners

FISCJAX SAP Sites: Mainsite Jacksonville, Mayport, FL, Kings Bay, GA,
Pascagoula, MS, Charleston, SC, Corpus Christi, TX,
Ingleside, TX, and Kingsville, TX

FISCJAX FY01 REQUISITION SUBMISSION DEADLINES

The following deadline dates will apply to any requisition requiring purchase action by FISC Jacksonville in FY01:

<u>Estimated Value of Procurement</u>	<u>Priority</u>	<u>Deadline</u>
\$1 Million or more (including options)	All	30 Mar 01
\$100,000 to \$1 Million (including IT)	All	15 May 01
\$25,000 to \$100,000 Rental/Maintenance	All	01 Aug 01
\$25,000 to \$100,000 Non-GSA	All	15 Aug 01
Under \$25,000 FY02 Rental/Maintenance Renewals and new Requirements	All	31 Aug 01
\$25,000 - \$100,000 Available on GSA Schedule	All	14 Sep 01
Under \$25,000	4-15	21 Sep 01
Under \$25,000*	1/2/3	29 Sep 01
*NOTE: If purchase card eligible, submit required documentation in accordance with current rules & regulations.		

Note: Every effort will be made to process all requirements, time permitting. Requisitions submitted after normal cut-off dates will be processed based upon priority and end of Fiscal Year time constraints. Every effort should be made to submit requirements within the established cut-off dates in order to ensure timely processing of requirements and obligation of funding.

Enclosure (1)

The focus of the Information Technology (IT) policy has changed from Life Cycle Management (LCM) to IT Capital Planning and Information Technology Acquisition Management (ITAM). Field activity authority for IT acquisition is conveyed through approval of an annual Information Technology Infrastructure Abbreviated Acquisition Program (ITIAAP) Plan. The required ITAM documentation for these requirements is an ITIAAP plan. Requirements for IT requisitions includes computer hardware and software, data, or telecommunications that performs functions such as collecting, processing, transmitting and displaying information.

FISC JAX REQUIREMENTS FOR IT REQUISITIONS SUBMITTED FOR PROCESSING ARE:

FOR SAP REQUIREMENTS (up to \$100,000)

The statement on each requisition that it is IAW (activity's) approved annual ITIAAP plan.

FOR LARGE PURCHASE REQUIREMENTS (>\$100,000)

A copy of the first page and the signature page of the activity's approved annual ITIAAP plan.

Enclosure (2)

Information Technology-Related Procurement Review and Approval

Activity:

Procurement Description:

Procurement Dollar Value:

Procurement Award Date:

This IT Procurement is in excess of \$25,000 and does not include requirements for:

- A. Local voice services
 - B. Top Secret or compartmentalized information
 - C. Cryptologic-related activities related to national security systems
 - D. Computer resources (hardware and software) that are physically part of, dedicated to,
- and essential to the performance of a weapons systems or shipboard system associated with the IT-21 effort.

NOTE: Embarkable/deployable workstations, portable computers, laptop computers, etc. are not included in the above exemptions.

_____ Waiver to use other than the NMCI contract is approved based on IT capabilities being unavailable under the NMCI contract.

_____ Waiver to use other than the NMCI contract is approved based on the requirement being essential to the successful execution of a command program initiative that is clearly needed before it can be delivered under the NMCI contract.

_____ Waiver to use other than the NMCI contract is approved for IT services for which the period of performance will expire before transition to the NMCI contract, (or a reasonable time thereafter as agreed by the NMCI Government Management Office and requesting official (see attached email, FAX, etc. agreement by the NMCI GMO)).

Approved:

Flag Officer/SES

Date

Enclosure (3)

DOCUMENTATION REQUIRED FOR MICROPURCHASES (<\$2500)

In accordance with NAVSUP policy letter SA99-16, dated 08 APR 99, the requiring customer shall ensure that purchase requests forwarded to the supporting purchasing office include a written statement either on the face of the purchase request or as a separate document, detailing one of the following circumstances:

1. "The following vendor(s) were contacted and refused to accept the purchase card."

This statement is the only one that **may** preclude the use of the purchase card. The requiring customer shall identify at least two vendors contacted who refused the acceptance of the purchase card (only one vendor required on sole source requirements). If the buyer, at the supporting purchasing office, locates a vendor that will accept the purchase card, the purchase request shall be returned to the requiring customer to utilize their purchase card and complete the transaction. Prior to issuing any type of award/order valued at or below \$2500, the supporting purchasing office is responsible for preparing and obtaining the approval of a written determination. The only written determination authorized for processing purchase orders, orders under task and delivery order contracts, orders under basic ordering agreements or calls against blanket purchase agreements, (when not utilizing the purchase card on a stand alone basis or as the method of payment) is, "the source or sources available for the supply or service do not accept the purchase card and the contracting activity is seeking a source that accepts the purchase card." (In accordance with OUSD (A&T) memorandum of 2 October 1998.)

2. "The requested supply or service requires written terms and conditions". The requiring customer shall list the written terms and conditions and reasons therefore. The purchase request shall also state if the Government Commercial Purchase Card will be used as the method of payment. The purchase request shall state the name of the cardholder and telephone number.

Any questions to the above, please call Carolyn King (904) 542-1250 or Ingrid Williams (904) 542- 1076.

Enclosure (4)

FISC JAX CONTRACTING DEPARTMENT TELEPHONE LIST

FAX: (904) 542-1087

COMM: (904) 542-XXXX

DSN: 942-XXXX

CONTRACTING

Bobby Warfield, LCDR

Director of Contracting

542-1073

Larry Bergeron

Deputy Director of Contracting

542-1000 X 174

or

542-1065

LARGE PURCHASE DIVISION

FAX: (904) 542-1098

Fran Kennedy

Division Manager

542-1062

Rebecca Washington

Contract Specialist

542-1162

Bill Reid

Contract Specialist

542-1246

Victoria West

Contract Specialist

542-1253

Kay Eichholz

Contract Specialist

542-1063

Jackie Jackson

Contract Specialist

542-1264

Brenda Norris

Contract Specialist

542-1139

Jackie Woloscheck

Contract Administrator

542-1248

Len Moran

Contract Administrator

542-1079

Margaret Fenn

Procurement Technician

542-1070

Ryan Mullins

Contract Specialist (Intern)

542-1256

Rolando Turner

Contract Specialist (Intern)

542-1166

POLICY AND ANALYSIS DIVISION

FAX: (904) 542-1096

Janell Palmer

Division Manager

542-1251

LaVerne Clark

Procurement Analyst

542-1265

Cassandra (Sandy) Roberts

Procurement Analyst

542-1255

Jim Hamm

Management Analyst

542-1257

VOUCHER PAYMENT

FAX: (904) 542-0142

Shirl Williams

Voucher Examiner

542-0147

Vernice Clements

Voucher Examiner

542-0148

Debrah Lewis

Voucher Examiner

542-0146

David Toffolio

542-1219

Enclosure 5

SIMPLIFIED ACQUISITION PROCEDURES**FAX: (904) 542-0927**

Carolyn King	Manager	542-1250
Mattie Washington	Procurement Analyst	542-1254
Ingrid Williams	Purchase Card Program	542-1076

MAIN SITE/NADEP OFFICE**FAX: (904) 542-1163**

Edwin Wilcher	Manager	542-1082
Carol Foulk	Purchasing Agent	542-1072
Sheila Pearson	Purchasing Agent	542-1140
Gladys Callahan	Purchasing Agent	542-1067
Venita Harmon	Purchasing Agent	542-1229
Clarice Poitier	Purchasing Agent	542-1132
Bobby Mathews	Purchasing Agent	542-1083

MAYPORT SITE**FAX: (904) 270-6498**

Mary Hart	Purchasing Supervisor	270-5699 X 150
Kathy Frisko	Purchasing Agent	270-5699 X 146
Judy Hopper	Purchasing Agent	270-5699 X 147
Luis Navarro	Purchasing Agent	270-5699 X 156
Susan Pierce	Purchasing Agent	270-5699 X 153
Ellen Reich	Procurement Technician	Fla Relay Service
		Dial 1-800-955-
		8770 (Voice) via
		270-6497 TDD

PASCAGOULA SITE

Alisa Murray	Purchasing Agent	DSN 358-2009
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CORPUS CHRISTI SITE**FAX: (361) 961-2394**

Lino Vera	Supervisory Contract Specialist	DSN 861-3661/3662
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Corpus Christi

Baldomero Garza	Purchasing Agent	DSN 861-3878
Jesse Garcia	Purchasing Agent	DSN 861-3877
Larry Claridge	Purchasing Agent	DSN 861-2345

Kingsville

Joe Dominguez	Purchasing Agent	DSN 876-6168
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Ingleside

Marie (Lynda) Gaunt	Purchasing Agent	DSN 776-4533
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CHARLESTON SITE**Lori Wilhite****Purchasing Agent****DSN 794-7180****KINGS BAY SITE****FAX: (912) 673-2007****Dan Seep, LCDR****OIC/Site Director****DSN 573-2001 X 2561****Darlene Kunde****Deputy OIC****DSN 573-2001 X 2124****Paul Ison****Contract Specialist****DSN 573-2001 X 3809****Amanda Butler****Customer Liaison****DSN 573-2001 X 9931****Gianna Livingston****Procurement Technician****DSN 573-2001 X 6559****Small Purchase****FAX: (912) 673-2659/2191****Donna Hill****Lead Purchasing Agent****DSN 573-2001 X 2656****Carolyn Wilson****Lead Purchasing Agent****DSN 573-2001 X 9283****Juliet Bohannon****Purchasing Agent****DSN 573-2001 X 3800****Andrea Brown****Purchasing Agent****DSN 573-2001 X 4422****Nina Miller****Purchasing Agent****DSN 573-2001 X 6963****Carolyn Walker****Purchasing Agent****DSN 573-2001 X 8517****Alice Settle****Purchasing Agent****DSN 573-2001 X 2665****Tracy Green****Purchasing Agent****DSN 573-2001 X 3805****SMALL BUSINESS****FAX: (904) 542-1099****Glenda Rife****Deputy for Small Business****542-1143****Carolyn Williams****Small Business Specialist****542-1031****Margaret Ray****Procurement Technician****542-1143****FISC COUNSEL****FAX: (904) 542-1100****Phil Adams****Counsel****542-1260****Kathy Tinkler****Paralegal****542-1128****Sharon Key****Legal Technician****542-1127**